

XML Instructions for Appointments and Fees Report

Note: Yellow text and sample no activity report added April 2015

```
<?xml version="1.0" encoding="utf-8"?>
<IMPORTFILE>
<RECORD_HEADER>
<MONTH>01</MONTH> required – Must be the numeric value for the month. Can use either 1 or 01 (January) through 12 (December)
```

From the XSD Template – only the enumeration values are acceptable.

```
<xs:element name="MONTH">
  <xs:simpleType>
    <xs:restriction base="xs:int">
      <xs:enumeration value="1" />
      <xs:enumeration value="2" />
      <xs:enumeration value="3" />
      <xs:enumeration value="4" />
      <xs:enumeration value="5" />
      <xs:enumeration value="6" />
      <xs:enumeration value="7" />
      <xs:enumeration value="8" />
      <xs:enumeration value="9" />
      <xs:enumeration value="10" />
      <xs:enumeration value="11" />
      <xs:enumeration value="12" />
    </xs:restriction>
  </xs:simpleType>
</xs:element>
```

```
<YEAR>2008</YEAR> required – Must be one of the YEAR values in the XSD Template
```

From the XSD Template – only the enumeration values are acceptable.

```
<xs:element name="YEAR">
  <xs:simpleType>
    <xs:restriction base="xs:int">
      <xs:enumeration value="2017" />
      <xs:enumeration value="2016" />
    </xs:restriction>
  </xs:simpleType>
</xs:element>
```

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```
<xs:enumeration value="2015" />
<xs:enumeration value="2014" />
<xs:enumeration value="2013" />
<xs:enumeration value="2012" />
<xs:enumeration value="2011" />
<xs:enumeration value="2010" />
<xs:enumeration value="2009" />
<xs:enumeration value="2008" />
<xs:enumeration value="2007" />
</xs:restriction>
</xs:simpleType>
</xs:element>
<PREPARED_BY>JOHN SMITH</PREPARED_BY> not required – alpha-numeric, not case sensitive, but should be entered
<PREPARED_DATE>2009-02-03</PREPARED_DATE> required – Must be in this format: YYYY-MM-DD
</RECORD_HEADER>
<RECORD>
<RECORD_NUMBER>001</RECORD_NUMBER> required – Must be a positive numeric value, can start with 0 but doesn't have to: (001 or 1)
<COURT>96</COURT> required – Must be one of the COURTS values in the XSD Template. Look up the correct Court_ID from one of the attached Excel files.
```

From the XSD Template – only the enumeration values are acceptable (this example is based on Brazoria county)

```
<xs:element name="COURT">
<xs:simpleType>
<xs:restriction base="xs:int">
<xs:enumeration value="96" />
<xs:enumeration value="108" />
<xs:enumeration value="55" />
<xs:enumeration value="62" />
<xs:enumeration value="4485" />
<xs:enumeration value="3230" />
<xs:enumeration value="3231" />
<xs:enumeration value="3232" />
<xs:enumeration value="4511" />
<xs:enumeration value="332" />
</xs:restriction>
</xs:simpleType>
```

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```
</xs:element>
<JUDGE>1234</JUDGE> required – numeric, should match the correct Judge_Position_ID number in one of the attached Excel files
<CASE_NUMBER>PR50133</CASE_NUMBER> required – alpha-numeric, not case sensitive, but should be entered
<CASE_STYLE>BOB v. TOM</CASE_STYLE> required – alpha-numeric, not case sensitive, but should be entered
<APPT_TEXAS_ATTORNEY>true</APPT_TEXAS_ATTORNEY> required – Must be either true or false and is case sensitive
<APPT_BAR_NUMBER>1212456</APPT_BAR_NUMBER> required if APPT_TEXAS_ATTORNEY is true – alpha-numeric, not case sensitive
<APPT_FNAME>Jimmy</APPT_FNAME> not required but if entered must be alpha-numeric, not case sensitive
<APPT_LNAME>Joseph</APPT_LNAME> required – alpha-numeric, not case sensitive; the names of entities (banks, programs, etc.) should be entered in
this field. There is a 200 character limit.
<APPT_MNAME></APPT_MNAME> not required – alpha-numeric, not case sensitive
<APPT_SUFFIX></APPT_SUFFIX> not required – alpha-numeric, not case sensitive
<APPT_POSITION>guard_ad_litem</APPT_POSITION> required – Must be one of the APPT_POSITION values in the XSD Template
    From the XSD Template – only the enumeration values are acceptable.
    <xs:element name="APPT_POSITION">
        <xs:simpleType>
            <xs:restriction base="xs:string">
                <xs:enumeration value="ad_litem" /> Ad Litem
                <xs:enumeration value="admin" /> Administrator
                <xs:enumeration value="amicus_att" /> Amicus Attorney
                <xs:enumeration value="apr" />Appraiser
                <xs:enumeration value="arbitr" /> Arbitrator
                <xs:enumeration value="attr" /> Attorney
                <xs:enumeration value="attr_ad_litem" /> Attorney Ad Litem
                <xs:enumeration value="commisnr" /> Commissioner
                <xs:enumeration value="crt_visitor" /> Court Visitor
                <xs:enumeration value="executor" /> Executor
                <xs:enumeration value="frnd_crt" /> Friend of the Court
                <xs:enumeration value="guard" /> Guardian
                <xs:enumeration value="guard_ad_litem" /> Guardian ad litem
                <xs:enumeration value="hear_officer" /> Hearing Officer
                <xs:enumeration value="interpreter" /> Interpreter
                <xs:enumeration value="investigator" /> Investigator
                <xs:enumeration value="master" /> Master
                <xs:enumeration value="master_in_chancery" /> Master in Chancery
                <xs:enumeration value="mediator" /> Mediator
```

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```
<xs:enumeration value="perm_guard" /> Permanent Guardian  
<xs:enumeration value="personal_rep" /> Personal Representative  
<xs:enumeration value="physician" /> Physician  
<xs:enumeration value="psych" />Psychologist  
<xs:enumeration value="receiver" /> Receiver  
<xs:enumeration value="referee" /> Referee  
<xs:enumeration value="social_worker" /> Social Worker  
<xs:enumeration value="temp_guard" /> Temporary Guardian  
<xs:enumeration value="trustee" /> Trustee  
<xs:enumeration value="ump" />Umpire  
</xs:restriction>  
</xs:simpleType>  
</xs:element>
```

<APPT_TYPE>attr</APPT_TYPE> **required** – Must be one of the APPT_TYPE values in the XSD Template

From the XSD Template – *only the enumeration values are acceptable.*

```
<xs:element name="APPT_TYPE">  
  <xs:simpleType>  
    <xs:restriction base="xs:string">  
      <xs:enumeration value="attr" /> Attorney  
      <xs:enumeration value="frnd_family_memb" /> Friend or Family Member  
      <xs:enumeration value="private_prof_guard" /> Private Professional Guardian  
      <xs:enumeration value="public_guard_prog" /> Public Guardianship Program  
      <xs:enumeration value="na" /> Not applicable  
    </xs:restriction>  
  </xs:simpleType>  
</xs:element>
```

<FEE_SOURCE>trust</FEE_SOURCE> **required** – case sensitive, must be one of the FEE_SOURCE values in the XSD Template

From the XSD Template – *only the enumeration values are acceptable.*

```
<xs:element name="FEE_SOURCE">  
  <xs:simpleType>  
    <xs:restriction base="xs:string">  
      <b><xs:enumeration value="applicant" />Applicant</xs:enumeration></b>  
      <xs:enumeration value="county" /> County  
      <xs:enumeration value="defendant" /> Defendant  
      <xs:enumeration value="estate" /> Estate
```

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```
<xs:enumeration value="genrl_fund" /> General Fund
<xs:enumeration value="insur" /> Insurance
<xs:enumeration value="mang_conserv" /> Managing Conservator
<xs:enumeration value="named_person" /> Named Person
<xs:enumeration value="other" />Other
<xs:enumeration value="plaintiff" /> Plaintiff
<xs:enumeration value="possess_conserv" /> Possessory Conservator
<xs:enumeration value="pro_bono" /> Pro Bono
<xs:enumeration value="registry_court" /> Registry of the Court
<xs:enumeration value="state" /> State
<xs:enumeration value="the_parties" /> The Parties
<xs:enumeration value="trust" /> Trust
<xs:enumeration value="trustee" /> Trustee
<xs:enumeration value="unknown" /> Unknown
</xs:restriction>
</xs:simpleType>
</xs:element>
```

<FEE_TYPE>Trustee</FEE_TYPE> required – case sensitive, must be one of the FEE_TYPE values in the XSD Template

From the XSD Template – *only the enumeration values are acceptable.*

```
<xs:element name="FEE_TYPE">
<xs:simpleType>
<xs:restriction base="xs:string">
<xs:enumeration value="atty_fees" /> Attorneys fees
<xs:enumeration value="compn_fiduciary" /> Compensation for fiduciary services
<xs:enumeration value="eminent_domain_comm" /> Eminent domain commissioner fees
<xs:enumeration value="Mediator" /> Mediator fees
<xs:enumeration value="Trustee" /> Trustee's fees
<xs:enumeration value="na" /> Not available/applicable
</xs:restriction>
</xs:simpleType>
</xs:element>
```

<FEE_APPROVAL_DATE>2000-08-01</FEE_APPROVAL_DATE> required – Must be in this format: YYYY-MM-DD

<AMT_APPROVED>250.00</AMT_APPROVED> required – Numeric value and can have a decimal but doesn't have to: (250 or 250.00)

</RECORD>

</IMPORTFILE>

XML Instructions for Appointments and Fees Report

If additional codes need to be added for the APPT_POSITION, FEE_SOURCE, or FEE_TYPE fields, or if you need codes for the Court or Judge fields, please contact the Judicial Information Division at (512) 463-1640 or JudInfo@txcourts.gov.

Sample “No Activity” Report

“No Activity” Report for 1 Court

```
<?xml version="1.0" encoding="utf-8" ?>
- <IMPORTFILE>
- <RECORD_HEADER>
  <MONTH>3</MONTH>
  <YEAR>2015</YEAR>
  <PREPARED_BY>Joe Smith</PREPARED_BY>
  <PREPARED_DATE>2015-04-21</PREPARED_DATE>
  </RECORD_HEADER>
- <RECORD>
  <RECORD_NUMBER>1</RECORD_NUMBER>
  <COURT>357</COURT>
  <JUDGE>0</JUDGE>
  <CASE_NUMBER>na</CASE_NUMBER>
  <CASE_STYLE>na</CASE_STYLE>
  <APPT_TEXAS_ATTORNEY>false</APPT_TEXAS_ATTORNEY>
  <APPT_BAR_NUMBER>na</APPT_BAR_NUMBER>
  <APPT_FNAME>na</APPT_FNAME>
  <APPT_LNAME>na</APPT_LNAME>
  <APPT_MNAME>na</APPT_MNAME>
  <APPT_SUFFIX>na</APPT_SUFFIX>
  <APPT_POSITION>na</APPT_POSITION>
  <APPT_TYPE>na</APPT_TYPE>
  <FEE_SOURCE>na</FEE_SOURCE>
  <FEE_TYPE>na</FEE_TYPE>
  <FEE_APPROVAL_DATE>2015-04-22</FEE_APPROVAL_DATE>
  <AMT_APPROVED>0.00</AMT_APPROVED>
</RECORD>
```

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</IMPORTFILE>

“No Activity” Report for 2 Courts

```
<?xml version="1.0" encoding="utf-8" ?>
- <IMPORTFILE>
- <RECORD_HEADER>
  <MONTH>3</MONTH>
  <YEAR>2015</YEAR>
  <PREPARED_BY>Joe Smith</PREPARED_BY>
  <PREPARED_DATE>2015-04-21</PREPARED_DATE>
  </RECORD_HEADER>
- <RECORD>
  <RECORD_NUMBER>1</RECORD_NUMBER>
  <COURT>357</COURT>
  <JUDGE>0</JUDGE>
  <CASE_NUMBER>na</CASE_NUMBER>
  <CASE_STYLE>na</CASE_STYLE>
  <APPT_TEXAS_ATTORNEY>false</APPT_TEXAS_ATTORNEY>
  <APPT_BAR_NUMBER>na</APPT_BAR_NUMBER>
  <APPT_FNAME>na</APPT_FNAME>
  <APPT_LNAME>na</APPT_LNAME>
  <APPT_MNAME>na</APPT_MNAME>
  <APPT_SUFFIX>na</APPT_SUFFIX>
  <APPT_POSITION>na</APPT_POSITION>
  <APPT_TYPE>na</APPT_TYPE>
  <FEE_SOURCE>na</FEE_SOURCE>
  <FEE_TYPE>na</FEE_TYPE>
  <FEE_APPROVAL_DATE>2015-04-22</FEE_APPROVAL_DATE>
  <AMT_APPROVED>0.00</AMT_APPROVED>
  </RECORD>
  <RECORD_NUMBER>2</RECORD_NUMBER>
  <COURT>4590</COURT>
  <JUDGE>0</JUDGE>
  <CASE_NUMBER>na</CASE_NUMBER>
```

XML Instructions for Appointments and Fees Report

```
<CASE_STYLE>na</CASE_STYLE>
<APPT_TEXAS_ATTORNEY>false</APPT_TEXAS_ATTORNEY>
<APPT_BAR_NUMBER>na</APPT_BAR_NUMBER>
<APPT_FNAME>na</APPT_FNAME>
<APPT_LNAME>na</APPT_LNAME>
<APPT_MNAME>na</APPT_MNAME>
<APPT_SUFFIX>na</APPT_SUFFIX>
<APPT_POSITION>na</APPT_POSITION>
<APPT_TYPE>na</APPT_TYPE>
<FEE_SOURCE>na</FEE_SOURCE>
<FEE_TYPE>na</FEE_TYPE>
<FEE_APPROVAL_DATE>2015-04-22</FEE_APPROVAL_DATE>
<AMT_APPROVED>0.00</AMT_APPROVED>
</RECORD>
</IMPORTFILE>
```

Report for which 1 court has activity and another does not

```
<?xml version="1.0" encoding="utf-8" ?>
- <IMPORTFILE>
- <RECORD_HEADER>
  <MONTH>3</MONTH>
  <YEAR>2015</YEAR>
  <PREPARED_BY>Joe Smith</PREPARED_BY>
  <PREPARED_DATE>2015-04-21</PREPARED_DATE>
  </RECORD_HEADER>
- <RECORD>
  <RECORD_NUMBER>1</RECORD_NUMBER>
  <COURT>357</COURT>
  <JUDGE>0</JUDGE>
  <CASE_NUMBER>na</CASE_NUMBER>
  <CASE_STYLE>na</CASE_STYLE>
  <APPT_TEXAS_ATTORNEY>false</APPT_TEXAS_ATTORNEY>
  <APPT_BAR_NUMBER>na</APPT_BAR_NUMBER>
  <APPT_FNAME>na</APPT_FNAME>
  <APPT_LNAME>na</APPT_LNAME>
```

XML Instructions for Appointments and Fees Report

```
<APPT_MNAME>na</APPT_MNAME>
<APPT_SUFFIX>na</APPT_SUFFIX>
<APPT_POSITION>na</APPT_POSITION>
<APPT_TYPE>na</APPT_TYPE>
<FEE_SOURCE>na</FEE_SOURCE>
<FEE_TYPE>na</FEE_TYPE>
<FEE_APPROVAL_DATE>2015-04-22</FEE_APPROVAL_DATE>
<AMT_APPROVED>0.00</AMT_APPROVED>
  </RECORD>
- <RECORD>
  <RECORD_NUMBER>2</RECORD_NUMBER>
  <COURT>4590</COURT>
  <JUDGE>29933</JUDGE>
  <CASE_NUMBER>11-04-04682</CASE_NUMBER>
  <CASE_STYLE>IN THE INTEREST OF SAMUEL SMITH A CHILD</CASE_STYLE>
  <APPT_TEXAS_ATTORNEY>false</APPT_TEXAS_ATTORNEY>
  <APPT_BAR_NUMBER></APPT_BAR_NUMBER>
  <APPT_FNAME /></APPT_FNAME>
  <APPT_LNAME>FROST NATIONAL BANK OF AMERICA</APPT_LNAME>
  <APPT_MNAME /></APPT_MNAME>
  <APPT_SUFFIX /></APPT_SUFFIX>
  <APPT_POSITION>attr_ad_litem</APPT_POSITION>
  <APPT_TYPE>attr</APPT_TYPE>
  <FEE_SOURCE>applicant</FEE_SOURCE>
  <FEE_TYPE>na</FEE_TYPE>
  <FEE_APPROVAL_DATE>2015-01-02</FEE_APPROVAL_DATE>
  <AMT_APPROVED>1000.00</AMT_APPROVED>
  </RECORD>
</IMPORTFILE>
```